

Project Closeout Report

Presented to the IT Committee November 16, 2007

Project Name: LASR Project – Phase III

Agency: NDPERS

Business Unit/Program Area: 192

Project Sponsor: Sparb Collins

Project Manager: Deb Knudsen

Project Objectives	Measurements	
	Met/ Not Met	Description
1. Develop criteria to be included in the RFP.	Met	1. By using the consultant's workbook technique, we were able to develop a very specific requirements section, covering both functional and technical areas.
2. Develop a procurement strategy.	Met	2. At the beginning of the project, a timeline and procurement strategy was developed and provided to both the steering committee and the NDPERS Board. A Gantt chart was used to lay out the timeframes and included a Bidders Conference, a deadline for submittal of the RFP as well as a schedule for reviewing RFP's, evaluation of them, product demonstrations, site visits and reference checks was established and approved.
3. Create a draft RFP.	Met	3. A draft RFP was presented within the deadline established.
4. Create a final RFP.	Met	4. The final draft of the RFP was approved in enough time to allow for release of the RFP a week earlier than originally planned.
5. Manage pre-bid conferences	Met	5. A bidder's conference was held and attended by approximately 6 potential vendors. Follow-up questions were allowed and posted to the NDPERS website and the procurement website for interested vendors.
6. Evaluate responses to RFPs and provide an analysis to the NDPERS Board.	Met	6. One proposal was received within the deadline, was evaluated and found to meet criteria of the RFP. One proposal was received late and returned. The proposal was evaluated by the review team and found to meet all minimum requirements, receiving an overall high rating.
7. Manage post bid sessions with finalists.	Met	7. Vendor came in and made a successful presentation to all NDPERS Staff, as well as selected ITD staff.
8. Participate in and conduct on-site visits of finalists	Met	8. Selected members of the LASR team participated in two on-site visits of systems that are currently using the selected vendor. Results of the site visits were very encouraging and created a positive impression of vendor.

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9. Recommend top implementation vendors to the NDPERS Board.	Met	9. Steering committee recommended continuing to work with sole respondent, as all interaction and research has been positive.
10. Conduct reference checks on vendor finalists.	Met	10. Reference checks were conducted, contacting three former or existing clients of the vendor. Very good positive and enthusiastic responses were provided.
11. Participate in final contract negotiations	Met	11. Final negotiations were conducted and a signed contract was the result.
12. Establish NDPERS estimated implementation timeframes and staffing requirements.	Met	12. The project start date has been established as October 1, 2007, back filling of staff is nearly complete and a draft requirements traceability matrix has been initiated.
13. Keep NDPERS Board informed as requested by the Executive Director.	Met	13. Monthly information was provided to the NDPERS Board at each board meeting.

Schedule Objectives			
Met/ Not Met	Scheduled Completion Date	Actual Completion Date	Variance
Met	Originally scheduled for 6/1/2007, but was rescheduled due to migration project concerns.	Actual date of completion was 7/31/2007	Schedule objective was adjusted, but was met within variance.

Budget Objectives			
Met/ Not Met	Baseline Budget	Actual Expenditures	Variance
Met	\$590,326.00	\$480,421.33	Came in under budget 19%.

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Major Scope Changes

NDPERS had planned to review 3 – 5 proposals but only received one. In addition, the requirements traceability matrix was completed earlier than originally anticipated, but did not result in a budget change.

Lessons Learned

At the end of this phase, the steering committee got together and we collected everyone's input regarding the project. We specifically collected input on what lessons were learned from this group and they are listed below:

Things we would do again: All agreed that weekly steering committee meetings were a good thing for this project. In addition, broad based participation from staff in the requirements gathering sessions was identified as a real plus. We definitely would hire the same consultants (L.R. Wechsler, Ltd) to help us manage the process and would also continue to utilize the ITD Planning services as a resource, both really added value to our project. In addition, site visits were very helpful and talking to other states about their solutions was also.

Things we would not do again: We would have built in more flexibility in our solicitation regarding performance bonds and similar instruments. We have learned that performance bonds are generally renewed annually with no guarantee of renewal. As a non-renewal could occur for reasons unrelated to our project, it is doubtful we would have a straight performance bond requirement for any future projects. Although we did end up with a successful bid, several vendors informed us that they would have responded to the RFP if the pricing band had been higher. It was also stated that we should have had fewer optional components to avoid confusing the scope of the project for responsive vendors.

Things learned include: We learned that the procurement rules should be reviewed and incorporated into the detailed timeline for requirements such as posting the RFP and supporting documents to the procurement website, etc. As we were not familiar with this area, it took some time that we had not anticipated when we initially set up the schedule. In addition, in the future, we would also put the exact proposed contract language into the RFP rather than a rough draft. Although we did work with the Attorney General's office to provide draft contract language for the RFP, we ended up hiring an outside firm and rewriting the contract, adding much more specific language than previously provided in the RFP draft version. In this particular case, we would have been better off to engage the outside firm to have the contract drafted before we entered into the negotiations phase. It was also expressed that staff should have done more upfront research on back file conversion and workflow documentation prior to putting out the RFP by interviewing other states.

Success Story

Phase III was conducted successfully, meeting established timeframes and coming in under budget; resulting in a signed contract with a vendor NDPERS is pleased to be working with. Phase IV started up on time on October 1 and is currently in process.